

IT210—Federal Withholding Comparison to 2021 W-4

Create Withholding Info W4/W5 US (0210)

Personnel No

Name

Status

Active

EE group

A

Full Time Salary

Personnel ar

0815

DOA-Office of Technology Svcs

EE subgroup

01

Class Ex

Start

12/16/2020

to

12/31/9999

Status

Tax authority

FED

Federal

Tax level

A

Federal

Filing Status

☒

#1

☐ Use Higher Withholding Rates Schedule

#2

Exemptions

Credits for dep.

#3

USD

Tax Exempt Ind.

Not exempt

#4

**

☐ IRS mandates

☐ Foreign Earned Income

**R Exempt, reportable must always be selected when EE files Exempt

Withholding adjustments

Add.withholding

#5

USD

#6

☐ Non-resident tax calculation

Default formula

01

PCT MTHD-RES. U

Alternative formula

Other income

#7

USD

Deductions

#8

USD

Additional Information

☐ Check here if the last name differs from that shown on the Social Security card

#9

Overrides (from Infotype 0234)

From date	End Date	Supplemental method	Tax override	Empl. Override Group

Filing status

#1

The employee's filing status for tax purposes.

W-4: Use Higher Withholding Rates Schedule

#2

Indicates that the employee holds multiple jobs, or if married, both employee and spouse work are taken into account. The correct amount of withholding depends on income earned from all of these jobs.

Use

This checkbox is used if there are only two jobs total.

Dependencies

This option is accurate for jobs with similar pay. Otherwise, more tax than necessary may be withheld.

W-4: Total credits for dependents

#3

Indicates the total amount based on the number of dependents employee is claiming.

Tax exemption indicator

#4

Indicator which determines whether an employee's earnings are exempt from taxation.

Value Description Withhold tax? /6XX? /7XX?
(Taxable) (Taxed)

blank Not exempt Yes Yes Yes
R Exempt, reportable No Yes Yes
X Exempt, partly reportable No Yes No
Y Exempt, not reportable No No No

Use

If you have an employee that is exempt from taxation, but whose earnings are reportable, use R.

If you have an employee that is both exempt from certain taxes and whose earnings should not be reported, such as a foreign national, use indicator Y.

You also have the option of using X. With this indicator, no tax is withheld and the /6XX wage types are built, but the /7XX wage types are not.

Form W-4 (Rev. December 2020) Department of the Treasury Internal Revenue Service	Employee's Withholding Certificate ▶ Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. ▶ Give Form W-4 to your employer. ▶ Your withholding is subject to review by the IRS.		OMB No. 1545-0074 2021
	Step 1: Enter Personal Information (a) First name and middle initial: _____ Last name: _____ Address: _____ City or town, state, and ZIP code: _____ (c) <input type="checkbox"/> Single or Married filing separately <input type="checkbox"/> Married filing jointly or Qualifying widow(er) <input type="checkbox"/> Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)		(b) Social security number: _____ ▶ Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov .

#1

Complete Steps 2–4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at www.irs.gov/W4App, and privacy.

Step 2: Multiple Jobs or Spouse Works	Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs. Do only one of the following. (a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3–4); or (b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; or (c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld <input type="checkbox"/>
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TIP: To be accurate, submit a 2021 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

#2

Complete Steps 3–4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3–4(b) on the Form W-4 for the highest paying job.)

Step 3: Claim Dependents	If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly): Multiply the number of qualifying children under age 17 by \$2,000 ▶ \$ _____ Multiply the number of other dependents by \$500 ▶ \$ _____ Add the amounts above and enter the total here 3 \$ #3
Step 4 (optional): Other Adjustments	(a) Other income (not from jobs). If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income 4(a) \$ #7 (b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here 4(b) \$ #8 (c) Extra withholding. Enter any additional tax you want withheld each pay period 4(c) \$ #5 #4

Step 5: Sign Here	Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete. ▶ Employee's signature (This form is not valid unless you sign it.) _____ Date _____		
Employers Only	Employer's name and address _____	First date of employment _____	Employer identification number (EIN) _____

Additional tax amount

#5

Additional amount to be withheld, at the employee's request, for the payment of taxes.

Non-resident tax calculation indicator

#6

Used to indicate that an employee has been designated as a non-resident for payroll tax calculation purposes.

Use

Check this box if the employee's regular payroll tax calculation should use a non-resident alien formula.

Dependencies

If necessary, change the formula number to be used for the payroll tax calculation.

W-4: Other Income

#7

Indicates other income employee is claiming. The amount entered in this field may include interest,

dividends, and retirement income. Employee should not include income from any jobs in this field.

Example

If employee is still working, but receive pension benefits from a previous job.

W-4: Additional deductions

#8

Indicates the total of deductions other than the basic standard deduction from employee's paycheck.

Example

Employee has specific and large expenses such as, mortgage interest payments, charitable contributions, medical expenses, and so on. Employee can also have credits or other income adjustment for things like IRA contributions, alimony expenses, or student loan interest.

Check if last name is Different on SSN Card **#9**